



2017 - 2018 WORKPLACE CAMPAIGN  
**COORDINATOR HANDBOOK**  
A GUIDE TO HELP MAKE THE MOST OF YOUR UNITED WAY CAMPAIGN

[UnitedWayofLarimerCounty.org](http://UnitedWayofLarimerCounty.org)



# WELCOME CAMPAIGN COORDINATOR!

Thank you for joining in our movement to change lives and strengthen our community. Together, we're helping local children succeed in school, supporting families to become financially stable and self-sufficient, connecting people with food and shelter and much more.

You play a crucial role in the success of your company's campaign. The dollars raised through your workplace – because of your hard work and dedication – help more of our neighbors create a future filled with promise and opportunity.

Whether you have been a Campaign Coordinator for several years or this is your first campaign, this handbook gives you the resources, tools and tips needed to engage your colleagues in the work of United Way. You can also reach out to your United Way representative for additional assistance any time. We're here for you!



## WHAT IS YOUR ROLE AS CAMPAIGN COORDINATOR?

As Campaign Coordinator, you lead the planning, implementation and evaluation of your campaign. But don't worry - we'll be with you every step of the way.

## YOUR KEY RESPONSIBILITIES:

- Work closely with United Way staff to develop an effective campaign plan
- Seek support for your campaign plan from upper management
- Recruit a team of volunteers to assist you, with members from all levels of your organization (if applicable)
- Host an educational and fun campaign kick-off
- Educate employees about United Way and provide the opportunity for every employee to give
- Work with your United Way representative and your company payroll contact to collect and fulfill pledges
- Evaluate your campaign and make recommendations for next year
- Celebrate the success of your campaign and the impact your company has right here in Larimer County

## CHANGE BEGINS WITH YOU.

United Way **unites people and organizations** to **change lives** and **strengthen our community**.

**Together, we are changing lives.** Through your support of United Way of Larimer County, we help local children and families succeed in school, work, and life. We look at the whole picture of complex problems facing children and families impacted by poverty in Larimer County and tackle the source, not just the symptoms, of community challenges.

We go beyond short-term solutions to create lasting change that helps people today build stronger foundations for tomorrow. The long-term effects of these efforts benefit all of us, creating safe and healthier communities where a strong workforce contributes to the local economy so that each generation is better equipped than the last to seize the opportunities of tomorrow.

Thank you for joining our efforts and being part of the change. There is something for everyone at United Way, including opportunities to volunteer, donate and spread the word.

Great things happen when we LIVE UNITED.



# STEPS TO A SUCCESSFUL CAMPAIGN

## 1. GET TO KNOW YOUR LOCAL UNITED WAY

- Meet with your United Way representative, who will support you every step of the way.
- Review the United Way brochure.
- Visit our website for additional information: [www.uwaylc.org](http://www.uwaylc.org)

## 2. SECURE TOP LEVEL MANAGEMENT SUPPORT

- Ask your company leadership to consider providing a giving incentive. Examples include matching dollars, jeans coupons or a day-off certificate.
- Encourage your company leadership to speak at an all-staff meeting with your United Way representative to demonstrate their support of United Way.

## 3. RECRUIT A CAMPAIGN TEAM TO HELP YOU

- Find a volunteer to represent each of the various departments within your company, if applicable.
- Seek employees who have high energy, are passionate about United Way and are well respected in your organization.

## 4. DEVELOP A CAMPAIGN PLAN

- Make a plan that works for your organization. Consider your culture and coworkers' interests and create a plan that educates, energizes and will get results.
- Your United Way representative is a great resource to help you develop a plan and come up with creative ideas. Be sure to include them in the planning process!
- See page 6 for a sample timeline.



## 5. SET CLEAR GOALS

Set a goal that is challenging yet still realistic for your company. Work with your company leadership, campaign team and/or United Way representative to analyze the results of last year's campaign and set goals based on where you can make the greatest improvement.

Consider setting a goal for participation as well as a total fundraising goal. There is power in numbers and every dollar makes a difference.

## 6. PROMOTE AND IMPLEMENT YOUR CAMPAIGN

### *PUBLICIZE!*

- Place United Way posters and table tents in key meeting areas and break rooms.
- Make plans to send a series of emails to all employees to keep everyone informed of the good work that United Way does in the community as well as your campaign progress. See the Coordinator Toolkit online at [www.uwaylc.org](http://www.uwaylc.org) for sample messaging.
- Include campaign information in your company newsletter, intranet or other internal communication channels.
- Use special events and fun activities to add an additional spark to your campaign.
- Ask colleagues why giving to United Way is important to them and share these testimonials in your communications.

### *ASK!*

- The number one reason that people do not give is because they were not asked. Make it a priority to educate and provide the opportunity for every employee to give.
- The best way to communicate the community's need and make "the ask" is by inviting a United Way representative to speak with your employees during a staff meeting.
- Ask your company leadership to attend and publicly endorse the campaign.
- Encourage questions and thank employees for their participation.
- Make yourself available to answer any questions or concerns during the campaign. Your United Way representative is available to answer questions as well.
- Remember that no gift is too small.

## 7. SAY THANK YOU AND SHARE RESULTS WITH EMPLOYEES

- Publish the overall campaign results in an email, a company newsletter, and/or on a United Way poster. Brag about your success!
- Be sure to recognize and appreciate all of the donors! Consider hosting a thank you event for employees, or send a thank you letter or email to all donors.

## 8. REPORT YOUR RESULTS TO YOUR UNITED WAY REPRESENTATIVE

- Contact your United Way representative to pick up pledge forms and special event money within one week of ending your campaign.
- See page 8 for instructions on pledge forms and turning in donations.

## 9. PLAN FOR NEXT YEAR'S CAMPAIGN

- Organize a debrief meeting with your campaign committee and United Way staff to evaluate the various parts of the campaign.
- Make sure to take notes for next year!



# SAMPLE CAMPAIGN COORDINATOR TIME TABLE

Task	Target Date	Complete Date	Assigned To
<b>Pre-Campaign</b>			
Attend Campaign Kick-off in June			
Review materials and learn about United Way			
Set meeting with Resource Development Manager (60 days prior to campaign)			
Meet with Upper Management to obtain endorsement			
Recruit campaign committee members, if applicable			
Assess last year's campaign			
Set your company goal with committee and/or company leadership			
Develop campaign plan (Dates, events, incentives, etc.)			
Set date for United Way Presentation			
Assign tasks to committee			
<b>Campaign</b>			
Send Campaign Kickoff email (from Coordinator or company leadership)			
Implement Campaign Plan			
Publicize Campaign (hang posters, e-mail, newsletters)			
Hold presentation by United Way			
<b>Post-Campaign</b>			
Collect pledge forms from employees			
Contact United Way representative to pick up pledges within one week of ending campaign			
Host a debrief meeting with campaign committee			
Celebrate success!			

# DIGITAL CAMPAIGN TOOLKIT

United Way of Larimer County has created a digital Campaign Toolkit to ensure you have all the materials and resources you need at your finger-tips. Below is a [sample](#) of the materials available. Please note that these materials will be updated periodically. To locate these materials, visit [www.uwaylc.org/workplace-campaigns](http://www.uwaylc.org/workplace-campaigns) and click on “Campaign Toolkit.”

## GETTING STARTED:

- Instructions for Submission of Revenue
- Campaign of the Year Program
- Frequently Asked Questions
- Community Impact Partners List

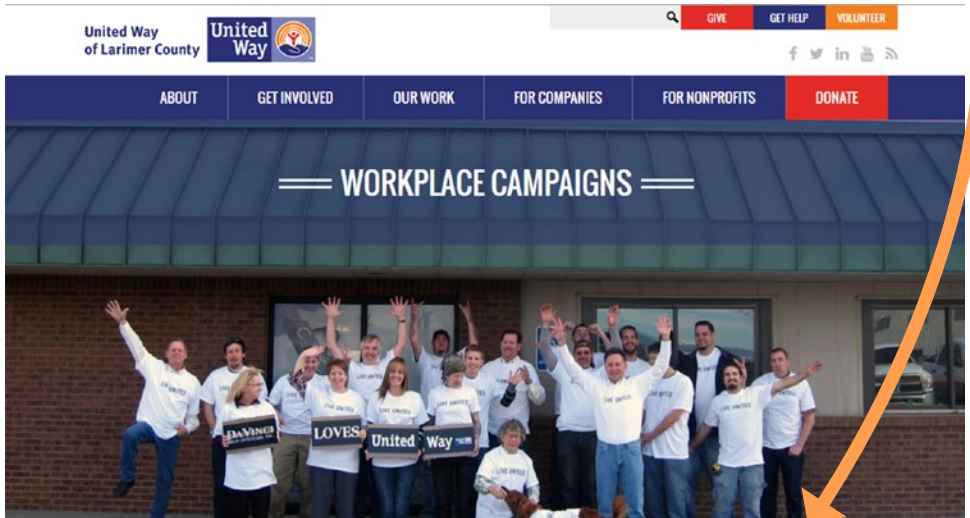
## EMPLOYEE ENGAGEMENT:

- Strategies to Increase Employee Engagement
- Special Event Ideas
- Loyal Contributors Campaign Coordinator Guide
- CEO Best Practices

## CAMPAIGN MATERIALS:

- Brochure
- Posters
- Videos
- Email Templates
- And More!

*Looking for something else? We're here to help! Don't hesitate to contact your United Way representative for more information.*



### WORKPLACE CAMPAIGNS

Every year, millions of employees get involved in workplace giving campaigns to support United Way solutions that make a difference in the community. Workplace campaigns unite employees





# CASH, CHECK AND FORM SUBMISSION

## COORDINATOR INSTRUCTIONS

Your United Way representative will provide you with the envelopes outlined below. Please use these envelopes to submit all cash, checks and pledge forms to United Way staff. ALL envelopes must be sealed and signed over the seal by a company representative before being picked up by United Way staff.

### *SPECIAL EVENTS*

#### **Gold 6x9 Envelopes**

All money collected for special events (bake sales, jeans coupons, chili cook offs, silent auctions, etc.) must be submitted in one or more “special event revenue” envelopes. These envelopes should ONLY be used for special events. Please complete the front of envelope before submitting to United Way staff.

It is the coordinator’s choice whether or not to count the cash/checks before submitting your envelope to your United Way staff representative.

- If you choose to count the cash/checks, write total amount included on front of envelope
- If you do not wish to count the cash/checks, mark the “I did not count the enclosed” checkbox on front of envelope

\*Seal and sign over seal before submission to United Way.

### *EMPLOYEE GIFTS/PLEDGE FORMS*

#### **White 9x12 Envelopes**

All employee gifts, including all pledge forms, cash and checks, should be submitted in one or more “Employee Gifts” envelopes. These are the 9x12 envelopes with a neon label on the back. Please do not write on the front of the envelope (marked “For UWLC use only”). Please complete the neon sticker before submitting to United Way staff.

It is the coordinator’s choice whether or not to count the cash/checks attached to employee gifts before submitting your envelope to your United Way staff representative.

- If you choose to count the cash/checks, write total amount included on neon label
- If you do not wish to count the cash/checks, mark the “I did not count the enclosed” checkbox on the neon label

\*Seal and sign over seal before submission to United Way.

**Please remember: Your United Way staff representative CANNOT pick up any cash, checks, or pledge forms from you unless it is in a sealed and signed envelope.**

# CAMPAIGN AWARDS

United Way of Larimer County presents a series of campaign awards annually to honor companies and individuals for their dedication to United Way's vision. These awards are presented at the Campaign Appreciation Social held in late January / early February each year.

## SPIRIT OF GIVING

The Spirit of Giving Award recognizes those companies and organizations that have done an outstanding job during the annual United Way of Larimer County campaign.

The purpose of this award is to recognize companies that demonstrate a high level of community engagement through workplace campaigns and volunteerism and create community awareness by recognizing the efforts of local businesses that support United Way of Larimer County.



## COORDINATOR OF THE YEAR

The Coordinator of the Year Award is given to a Campaign Coordinator who shows exemplary commitment to and passion for United Way of Larimer County and our community. The Coordinator of the Year typically goes above and beyond the Campaign Coordinator job description to ensure the success of his or her workplace campaign.



## CAMPAIGN OF THE YEAR

The Campaign of the Year program is designed to create friendly competition among workplace campaigns and encourage organizations to implement United Way of Larimer County Campaign Best Practices. The competition is based on a point structure designed to recognize the best overall workplace campaigns and encourage successful and engaging campaigns. The award is a unique bronze sculpture that resides at the winning organization for one year, representing the dedication, support and team effort it takes to achieve one's goals and drive long-lasting change for children and families in Larimer County.

# CAMPAIGN OF THE YEAR



## CONGRATULATIONS TO OUR 2016 AWARD WINNERS!

**TOP CONTRIBUTOR:** The Group, Inc.

**SPIRIT OF GIVING:** Agrium, High Country Beverage and Xcel Energy

**SPECIAL RECOGNITION:** Odell Brewing Co. and Enterprise Holdings

**ROOKIE COORDINATOR OF THE YEAR:** Brian Guiberson, Hach Company

**COORDINATOR OF THE YEAR:** Lisa Hite, The Group, Inc.

**ROOKIE CAMPAIGN OF THE YEAR:** Waddell & Reed

**CAMPAIGN OF THE YEAR:** Broadcom Limited

Thank you for your dedication to our community!



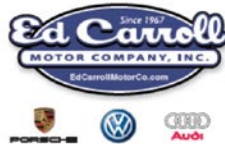
Campaign of the Year  
Broadcom Limited

# CORNERSTONE PARTNERS

Cornerstone Partners help underwrite United Way's operating costs so your donation can have the greatest impact in our community. Our sincere thanks go out to these organizations for their continued generosity and support.



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